

ePlan User Access Roles for LEAs

I. Funding Application Roles

Each funding application needs three roles to complete the application.

1. **Grant Director**—Each grant has a specific director role that can be found below.
2. **Fiscal Representative**—This role is listed in the **Fiscal, View & Approve** area of the *User Access Form*.
3. **LEA Authorized Representative**—This role is listed in the **Fiscal, View & Approve** area of the *User Access Form*.

Some funding applications may also have an **Update** role. Users who are assigned these roles can edit the application but cannot submit it.

Funding Application Director Roles

Each of the funding application listed below have director role assigned that can edit and complete the funding application. The directors can also click draft/revision started and draft/revision complete.

- 21st CCLC/LEAPS and 21st CCLC Remaining Funds
- ARP Homeless 1.0
- ARP Homeless 2.0
- ARP IDEA
- ATSI 18
- ATSI 19
- ATSI 21
- Adaptive Learning Technology
- Best for All
- CARES/ESSER1.0
- CARES/ESSER2.0
- CARES/ESSER3.0
- Civics Seal
- Competitive Priority School State Grant
- Consolidated Director
- Consolidated Update – *can edit but not submit the Consolidated Funding Application (CFA)*
- Coordinated School Health
- CTE Incentive Director
- CTE Perkins Basic
- CTE Perkins Reserve
- Diversity Innovation
- Early Literacy Networks
- Epidemiology & Laboratory Capacity (ELC)
- ESSER 2.0 Mental Health Supports
- ESSER Planning
- Family Resource Center
- Focus Schools



Funding Application Roles (cont'd)

- High Opportunity School Literacy Grant
- IDEA Discretionary Supplemental Funds
- IDEA Innovation
- IDEA Partnership for Systemic Change K-12—*the address book shows this role as IDEA Discretionary*
- IDEA Partnership for Systemic Change Preschool—*the address book shows this as IDEA Discretionary*
- IDEA Technology Partnership
- Innovative High Schools
- LEA Reopening and Programmatic Supports
- Learning Camps
- Learning Camps Transportation
- Literacy Training Teacher Stipend Grant Director
- Out of School Time Career Pathways
- Pre-K Coaching Pilot
- Principal Pipeline Partnership
- Priority School State
- Priority Schools Planning
- Project Aware
- Project Aware 2.0
- Safe Schools
- School Improvement (*includes [a] Innovation Zone (iZone) [b] Principal Priority Leadership Incentive [c] School Improvement Grant (1003G) [d] School Improvement Grant Cohort 4*)
- School Level Improvement
- School Resource Officer
- School Turnaround Pilot Program
- State Funds
- Student Support and Academic Enrichment
- Title III Immigrant
- Title IX McKinney-Vento
- TN All Corps
- Turnaround Action Grant (TAG) 1.0
- Turnaround Action Grant (TAG) 2.0
- Voluntary Pre-K (*includes Preschool Development Grant – Expansion*)

II. Monitoring Roles

Each Monitoring Instrument requires the LEA to have individuals with the monitoring director role for that instrument. Some Monitoring instruments have additional requirements, like ESEA/IDEA Results Based Monitoring, where the instrument must be approved by both the ESEA Director and IDEA Director. A full list of every role needed and what each role can do is found below.

Roles in **bold** are the roles unique to the monitoring instrument.

CCEIS

- **CCEIS Monitoring Director** - Click Draft Started and Draft Completed
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

CEIS

- **CEIS Monitoring Director** - Click Draft Started and Draft Completed
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

Continuous Learning Plan

- **Continuous Learning Plan Monitoring Director** - Click Draft Started and Draft Completed
- LEA Fiscal Representative - Click Approved or Not Approved
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

Results-Based Desktop Monitoring

- **ESEA/IDEA Results-based Monitoring Data Entry/ESSA Director and IDEA Director** - Click Draft Started, Edit Monitoring and Draft Completed
- **IDEA Director** - Click Draft Started, Edit Monitoring, and Draft Completed AND Click IDEA Director Approved or Not Approved
- **ESSA Director** - Click Draft Started, Edit Monitoring, and Draft Completed AND Click ESSA Director Approved or Not Approved
- **CTE Monitoring Director** - Click CTE Director Approved or Not Approved.
- LEA Fiscal Representative - Click LEA Fiscal Representative Approved or Not Approved
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

IDEA Discretionary & Competitive Grant Monitoring

- **IDEA Discretionary & Competitive Grant Monitoring Director** - Click Draft Started and Draft Completed
- LEA Fiscal Representative - Click Approved or Not Approved
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

Non-Public Schools Monitoring

- **Non-Public Monitoring Director** - Click Draft Started and Draft Completed
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

Resource Allocation Review

- **Resource Allocation Review Monitoring Director** - Click Draft Started and Draft Completed
- LEA Fiscal Representative - Click Approved or Not Approved
- LEA Authorized Representative - Click LEA Authorized Representative Approved or Not Approved

III. Data and Information

- CBO ePlan User Audit
- Charter Schools ePlan User Audit
- Coordinated School Health Action Plan
- Comparability—uses the Consolidated Director role
- Continuous Learning Plan
- CTE FAUPLE Target Negotiations
- Education Stabilization Fund
- ePlan Audit
- ESSER Pre-Approval
- Federal Program Waiver
- Homeless Immunization Report
- Innovative High School Model (IHSM) Funds Expenditure
- LEA ePlan User Audit
- N & D Child Count Subpart 1
- N & D Child Count Subpart 2
- Non-Public Schools ePlan User Audit
- Non-Public School Survey—uses the **Consolidated Director** role
- Perkins V Comprehensive Local Needs Assessment (CLNA)
- Prayer Certification—only needs the **LEA Authorized Representative** role
- Results-Based Monitoring Risk Analysis
- Title I, Part A, Private School Students Served Survey

IV. Other Roles

- **LEA Data View**—Individuals assigned this role can upload documents to the LEA Document Library and appear on the Contact page for certain funding applications.
- **LEA Fiscal Update**—Individuals assigned this role can request reimbursements from any funding application (CFO approval required for this role).
- **LEA Fiscal Representative**—Individuals assigned this role can fiscal approve funding applications and submit the state funds application.
- **Board Chair**—Individuals assigned this role can approve the state funds application.
- **County/City Clerk or SSD Recorder**—Individuals assigned this role can approve the state funds application.
- **LEA Authorized Representative**—Individuals assigned this role can approve all applications and monitoring instruments. Only the Director of Schools may have this role..
- **LEA Plan Data Entry**—Individuals assigned this role can edit the LEA Plan. This role is NOT for editing individual school plans.
- **LEA School Plan Reviewer**—Individuals assigned this role can edit the LEA Plan and approve School Plans. This role is NOT for editing individual school plans.
- **LEA User Access Administrators**—Add users to edit school plans.

V. Consolidated Funding Application Contacts

LEA Data View—Individuals assigned this role appear in the dropdown on the Consolidated Funding Application (CFA) Contact Page and can be identified as one of the following contacts in the CFA.

- ESEA Director
- IDEA Director
- Title I-A
- Title I: N & D
- Title II-A
- Title III-EL
- Title IV
- Title V
- IDEA, Part B
- IDEA Preschool
- Private Schools
- Migrant Liaison
- Homeless Children Liaison
- Family Engagement Liaison
- ESEA Bookkeeper
- Director of Schools
- IDEA Bookkeeper
- CFO or Treasurer
- Foster Care
- Juvenile Justice/Incarcerated Youth (Attendance Officer unless otherwise noted)
- Homeschool Coordinator